

Brave New Consumer

Changing Behaviours, Consumption & Customer Expectations in the Next Normal



What have we gone through?

No one thought health would become wealth.

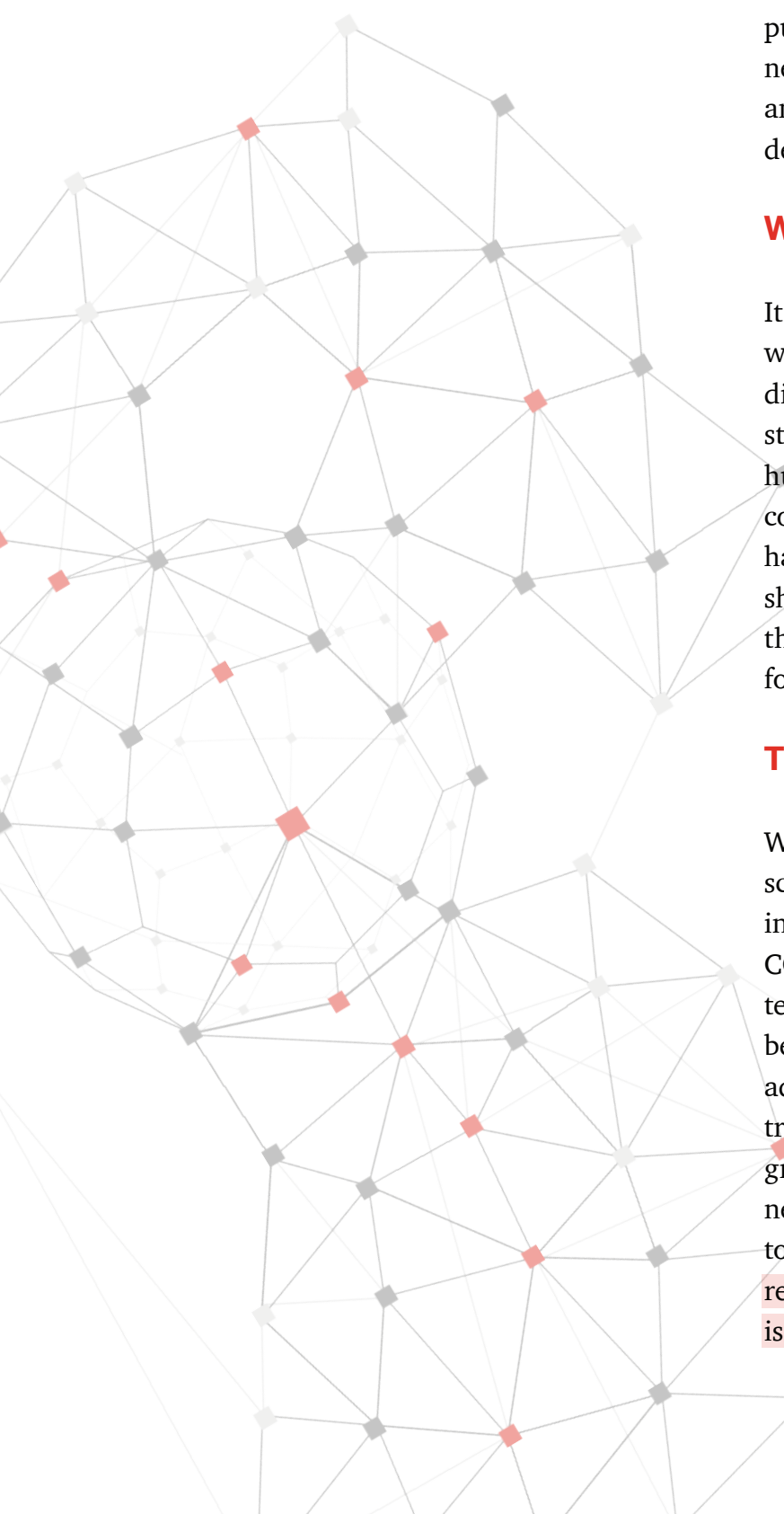
The entire world has unwillingly welcomed complete isolation or some form of it in order to survive the COVID-19 outbreak. This kind of separation from the outside world has pushed humanity to transition into a new period, where conscious decisions and actions of individuals become determinative of collective health.

Within days, we changed.

It began with basic routines. From washing hands to dealing with social distancing. Yet, within weeks, we started seeing radical changes in human behaviour and the way people consume. New, isolation-induced habits have emerged and have had short term impact, and it is suspected they will have long term consequences for consumers and businesses.

The digital world is thriving.

While everyone is staying home, digital screens have become magic windows into the world. People are coping with COVID-19 thanks to fast-paced digital technologies. The pandemic has become an accelerator of digital adoption and a driver of digital transformation in business. This is a great time for entrepreneurs to launch new digital products and for businesses to implement their agendas. It is a good reminder that in any breakdown, there is always a chance for a breakthrough.

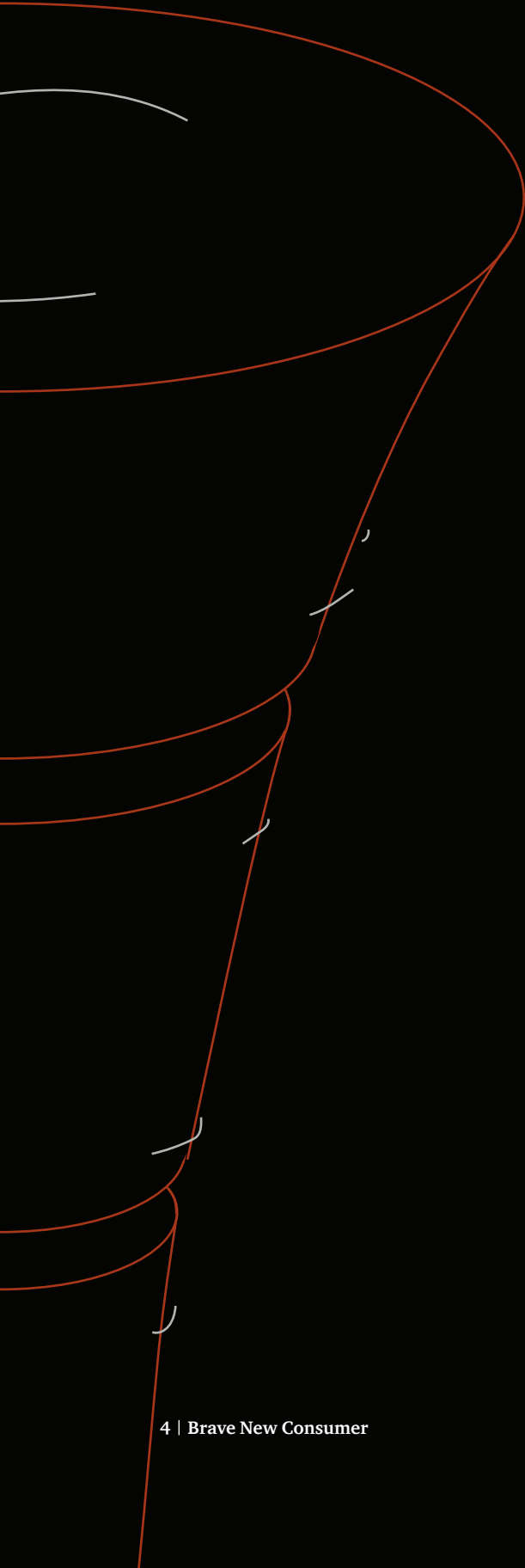


Although we have high hopes for a swift end to the pandemic, the question remains: are its implications for consumers here to stay in the next normal*?

*Breakthroughs born out of the pandemic shine a new light on our lives, putting everything into a different perspective, and behavioural adaptations resulting from this paradigm shift mark the start of a new period we call the “next normal.”

This edition is an attempt by PwC Turkey's Experience Consulting to put forth a perspective on this question.

OUR PERSPECTIVE



CHANGING BEHAVIOURS

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Lean Living
Self-sufficiency
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CHANGING CONSUMPTION

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CHANGING BEHAVIOURS

Scenarios from post-apocalyptic sci-fi movies have entered our lives. People are not able to leave their homes, and even the most mundane outdoor activities and errands require bravery. We can no longer travel, go out for a fancy lunch at a nearby restaurant, grab a quick coffee on the way to the office or drop our kids at school. The fragility of life has become more noticeable as a result of the lockdown, and this new awareness constantly requires people to be more brave in certain situations.

Definition of bravery has shrunk.

Yet the definition of bravery has shrunk to the point where even stepping out of our homes can be considered a heroic move. Consequently, this emerging awareness may lead people to act more “bravely” in certain aspects of life without leaving the safety of their homes. And when people are pushed to do things differently, the next normal becomes a breeding ground for new habits and behaviours. If the new habits are here to stay, we expect to see the following trends in human behaviours in the next normal.

Remote Working

Living spaces can be multifunctional. During this time, people have transformed their homes into multipurpose living spaces, with online tools enabling all sorts of remote activities, from working to schooling. As a result, people may leave activities that involve crowds in the past and prefer to do them in solitude at home. For example, during the pandemic, the usage rates of online meeting tools such as **Google Meet** and **Zoom** have skyrocketed.¹ Zoom, in response, has lifted the 40-minute time limit for schools to help with online learning, while Google has given everyone free access to its premium video-conferencing features for a time. Quickly adapting, the majority of employees have already begun working remotely at home.

Conferences are now being held virtually and documents are signed electronically.

A new CNBC Workforce Survey shows that over 25% of tech sector workers prefer permanently working remotely.²

In response, companies are questioning the necessity of physical work spaces and may seriously consider opportunities to permanently adopt new ways of working that are remote, flexible and do not involve commuting.

Lean Living

Although the importance of socialization and togetherness has been emphasized in the past, more individual, cautious lifestyles have now had to be adopted to preserve health. People started living leaner as the social and physical environment around them simplified. Due to physical isolation or total lockdown in some parts of the world, the number of people encountered during a day decreased sharply.

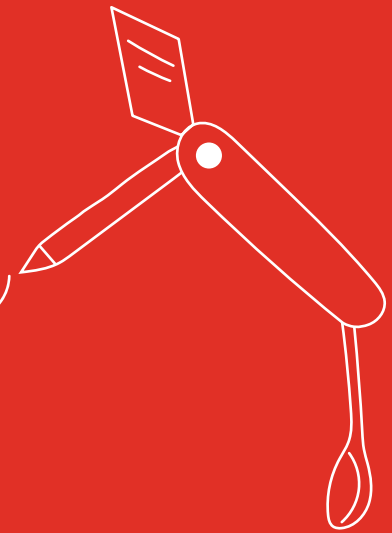
Consequently, physical isolation bred social isolation in the first days of pandemic.

People spending time in isolation felt a longing for authentic human connection more strongly than ever. As individuals were reminded of the importance and value of social relationships, they started putting extra effort into exploring ways to keep in touch with family and a limited number of friends.

As a result, social media and digital tools for communication are being used more than usual, as they enable people to continue doing remotely most of the things they did physically in the past. This provided a huge opportunity to small players like Zoom and Houseparty, and to social media giants like Whatsapp and Facebook, as they have created virtual connections, which has been the most widespread solution to loneliness in isolation.³

In our new lifestyle we have more valuable relationships with family and friends due to the simplification of our physical manner of living, and it seems these strong bonds will remain after the pandemic. This transformation in human relations can infuse the habits of individualistic lifestyle - such as living alone, into collectivist one.

Self-sufficiency



As many organizations switched to dormant mode and almost all service providers are physically closed, people have had to fulfil their needs on their own. Now, people are cooking at home more and meeting their personal care needs through their own efforts. Families seem to be embracing creativity while playing with their children or redecorating their homes. Because of these shifts in behaviours,

“How to” videos explaining do-it-yourself (DIY) concepts have been in demand during the pandemic.

According to a recent Google Insights analysis, people have become more creative and self-reliant, so their at-home needs around self care, beauty, food, and home decor are being fulfilled through self-learning and self-development.⁴

Consequently, online channels creating self-education opportunities have become popular during the pandemic. As people upskill and use their creativity, new virtual roles will be defined such as e-teacher, e-coach and e-designer. Therefore, new business opportunities will emerge for companies that want to leverage this self-sufficiency and digitalization behaviour during and after the pandemic.

Exploration

The more time spent in isolation, the more exploring people do. A Google Insight analysis, derived from Google searches, revealed that as immediate needs stabilize, people look for new ways to spend their time at home during lockdown.⁴ Most are more open to change than ever before. Many brands have already made use of this opportunity and have provided **extended trials** for their products/services. For instance, fitness companies are deploying a strategy of extended free trials for their online classes as app downloads and new sign ups have grown tremendously in recent months. **Nike** has seen a 100% increase in weekly active users of its Nike Training App in the U.S., while an 80% increase is reported for NTC workouts in China in the latest quarter.⁵

Although the recipients of these experiences were at first considered to be digitally-savvy users, digital services are being used across entire customer segments.

Adoption of digital channels has grown considerably, even among the most digitally resistant customers.

Gen X (those born 1965-1979) is now enjoying **virtual museum tours** and online shows. **Baby boomers** (those born 1946-1964) are also exploring **digital banking, e-commerce and home delivery**. As a response, most conventional service providers have begun offering online products and services. These recent habits may persist as we move into the next normal.

Transparency

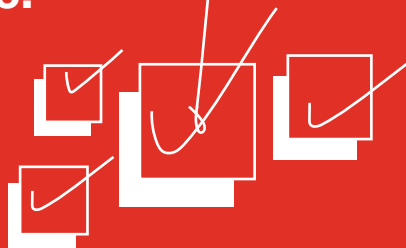
People are already used to sharing personal information on social media. Social openness and transparency come easily when sharing private life details such as location, lifestyle and moments of happiness with their social circles. However, with the spread of COVID-19, this joyful and arbitrary sharing among social circles has expanded into necessary tracking by authorities due to public safety concerns.

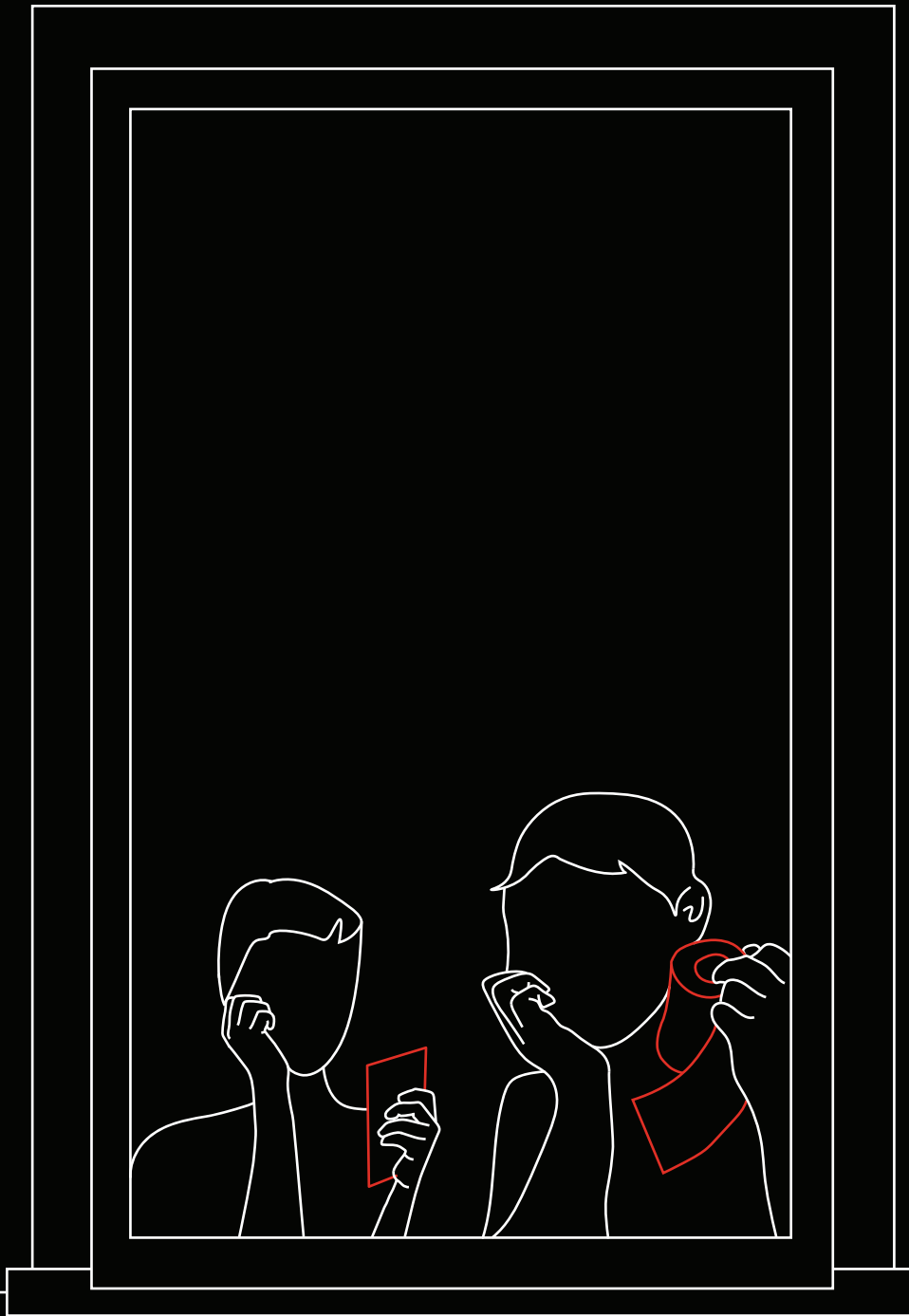
Many countries have developed their own COVID-19 apps which allow legal authorities to track their citizens. In addition, Apple and Google have recently released a software tool that will make it possible for nations to release coronavirus contact-tracing apps.⁶

Due to health concerns, people are no longer as resistant to giving their permission for such apps to process private data or to being constantly tracked digitally, as they were pre-pandemic.

This behaviour may expand to other services such as travel and accommodations. However, it raises the question of how the collected data is being used by these service providers. The answer may be **Digital ID & Certification**. As Microsoft founder Bill Gates highlighted the emergence of digital certificates in healthcare in a Q&A session with Reddit, a further increase of digital certificate usage across various sectors can be expected.⁷

Therefore, for people who place importance on privacy and personal data protection, the post-pandemic life may be hard to accept. Although apps and underlying digital enablers might remain, it is anticipated that the continuous tracking and data sharing of the pandemic might not remain as privacy norms in the next normal.





CHANGING CONSUMPTION

As a result of the COVID-19 pandemic and its heavy impact on our lives and economy, we have seen some clear shifts in consumer behaviour.

The next normal motive is “seek safety, avoid risk.”

Although some organizations hope that consumers will take part in “revenge shopping”, people will tend to be more frugal in the coming months, maybe years. Currently, most spending goes to fundamental needs like maintaining and preserving health, while the rest goes to home supplies and home entertainment.

As expenditure focuses shift, so do expenditure channels. Expenditure channels are going digital, one by one.

There has been high demand for subscription offerings by OTT video streaming, digital news and media, e-learning and communication companies.⁸ As a result, the share of wallet for digital services and technology has increased.

Although digital channels create convenience for shoppers, it seems shoppers will return to physical stores in the near future, but with recently-developed economic, hygiene and digital habits.

Economic resilience and physical safety concerns are expected to regulate the following habits in consumption in the next normal.

Frugality



Following the spread of COVID-19, there has been a move away from excessive consumption. Gen Z and Gen Y, who were born into a consumption-oriented world, are now experiencing the same economic anxiety baby boomers did in the post-war era. In contrast to what they used to, Gen Z (those born from 1997 to 2012) has learned to stock up. Household habits of the past, such as saving money, upcycling, stockpiling and managing supplies—which lost popularity over time—have re-emerged. When the pandemic broke out, people headed to grocery stores in droves to stock up on certain items such as toilet paper, flour and hand sanitizer in panic.

This panic response led to unpreparedness and scarcity which is likely to impact consumer behaviour going forward, and it may also make many consumers consider keeping emergency inventory at home on an ongoing basis.

Regardless of generation, consumers have become more hesitant to buy big-ticket items, as the future seems economically ambiguous. In addition, they prioritise products and services based on need and functionality.

As a result, being frugal may be the new norm, to ensure economic safety in post-pandemic.

Social Consciousness

Although mobility restrictions and lockdowns seemed to be negative, they pave the way for caring communities.

Due to limitations on mobility, communities tend to protect vulnerable groups. In some places, local and collective self-help groups have emerged as early signs of growing support for their communities. For example, younger generations have voluntarily visited the elderly in their neighbourhoods to meet their basic needs, which nourishes social cohesion. Moreover, local stores have played an important role in supporting communities by providing essential top-up shops and finding new ways to support those communities (including shopping hours for vulnerable people and click-and-collect services), according to the Strategy& “Where next retail?” report.⁹

While communities have started to support the vulnerable on a small scale, on a large scale the tendency to sustain national economies by producing and consuming locally is growing.

Communities and financially strong companies have supported local producers and tradesmen. For example, Turkish online retailer Trendyol, whose main shareholder is Alibaba, supported SMEs by promoting them on its e-commerce platform.¹⁰

As communities turn to local producers and manufacturers, the perception of the “Made In” label that is associated with luxury and quality goods may now be at risk. For example, products with “Made in Italy” labels may not resonate as being high-quality products as they did in the past, due to heavy media coverage of the spread of COVID-19 in Italy.

Therefore, “Locally made” may become the “next premium”, in certain parts of the world where this wasn’t already so.

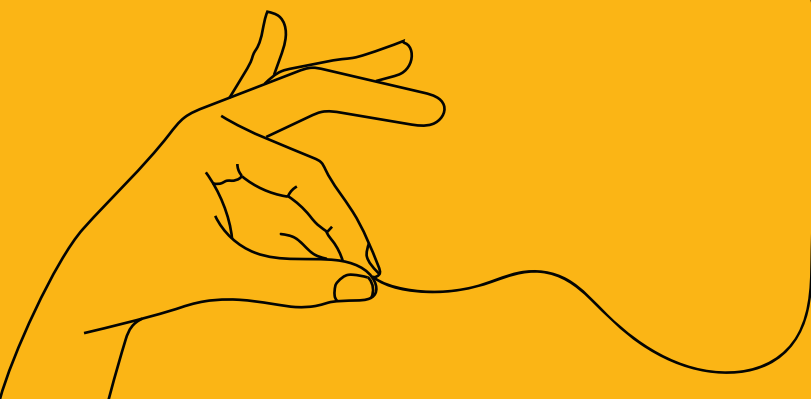
Contactless

Many stores are closed. Retailers haven't seen many of their customers in the past months. After WHO confirmed that COVID-19 spreads mostly through physical contact, the demand for contactless solutions rose sharply. Some brands quickly introduced contactless payment and delivery services to their customers. **Getir**, a Turkish delivery service, was the first to hang packages on door handles to avoid physical contact. Also, many banks increased spending limits on contactless credit cards.

These kinds of contactless offerings in delivery and banking apply to other industries as well. For example, in the food and beverage industry, people may not fill food courts as they did in the past. This may lead to the spread of new kitchen concepts, like **the ghost kitchen**, which does not offer seating but only provides delivery and pick up options. Another popular trend in the food and beverage industry is the spread of contactless cooking. Fast food giant **McDonald's** has been testing robot arms as a replacement for cooks.¹¹

As the concept of “contactless” becomes familiar to people, the spread of human-free brick and mortar shopping, like Amazon Go’s just-walk-out retail system, or CafeX’s robot coffee baristas, may be even closer than imagined.¹²

Online and contactless purchasing in low-price expenditures have expanded to physical big-ticket purchases during the pandemic. Naveen Soni, senior vice president - sales & services, **Toyota Kirloskar Motor** said, “To facilitate serving our customers who are homebound, we have made provisions to entirely digitalize the sales process, wherein the customer can take a virtual tour of a vehicle, select financing options and even receive a quotation online,” adding, “We have also made provisions for delivering the vehicle to the customer’s doorstep upon the completion of purchase.”¹³ It is certain that the effects of COVID-19 will disrupt the way industries serve their consumers and accelerate the integration of digital offerings.



Subscription-based

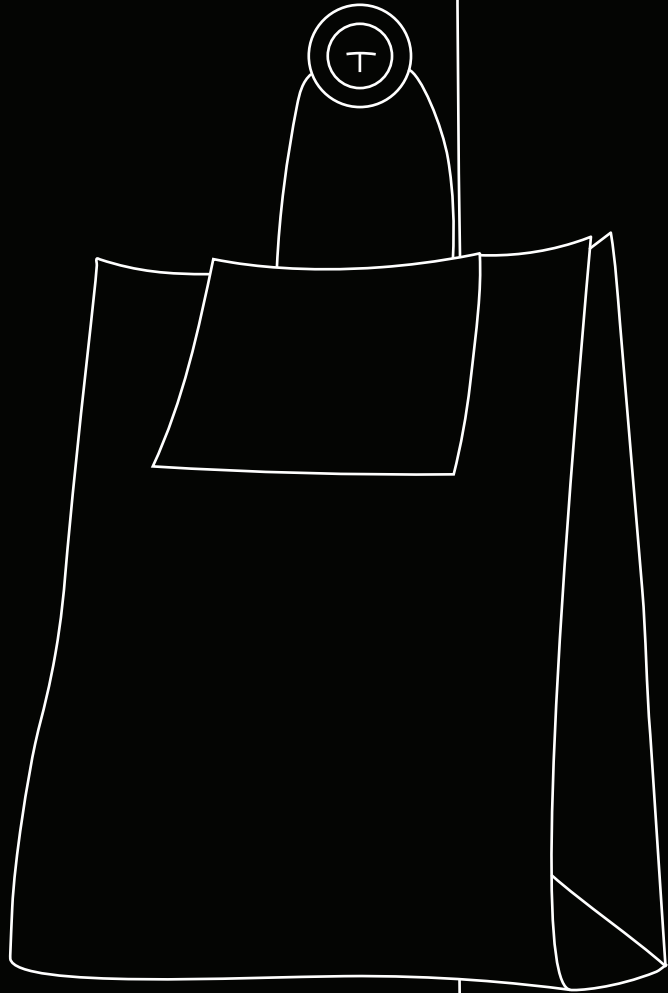
Due to endless days at home, consumers began looking for different ways to fulfil their needs and spend their time. So, online subscriptions skyrocketed during lockdown. Businesses providing services such as video streaming, digital news and entertainment, e-learning platforms and communications software have been pioneers in the realm of subscription services during this time, with new joiners such as health and fitness businesses following them. For example, Netflix added 15.8 million subscribers in the first quarter of 2020, more than double the 7.2 million that were expected.¹⁴ According to GlobalWebIndex, almost half of consumers, who are mostly Gen Z and millennials, are considering paying for a subscription service they never used before the spread of COVID-19.¹⁵ Many companies are offering free trials and extended services to make content available to a broader audience. For instance, PwC's Digital Fitness App, which helps employees explore digital trends and adapt to new ways of working and learning, is available for free to everyone for a limited time.¹⁶

In addition, many people are trying to exercise at home by bringing gym equipment into their living rooms. Small businesses and membership organizations like Down Dog, Headspace and SworKit create great value to meet evolving health and fitness demands.¹⁷ Down Dog offered free access to all its apps to students and teachers during the first months of pandemic. Carlos Ormachea, co-founder of Down Dog, said, "We've already provided over 300,000 free memberships and we are planning to continue as long as we can."¹⁸ These strategies allow companies to become more visible to potential subscribers and widen their funnels even in times of crisis such as these.

As consumers adjust to the subscription-based offerings of businesses, and more and more companies start offering services using this strategy, we expect that the upcoming battle will have to do with content.

Will businesses be able to continue releasing new content to survive in the next normal?





CHANGING CUSTOMER EXPECTATIONS

Customer experience has gained more importance during the pandemic.

With changing attitudes and consumption, change is inevitable when it comes to customer expectations and priorities regarding product/service providers. The relationships between communities and brands are ever more remote today. Organizations have been forced to make fundamental alterations in their business models and customer approaches upon moving to the next normal.

This is a unique time for brands to leverage the opportunity to build new products and services, internalizing new customer routines and converting them into new rituals in their customers' next normal.

While doing so, brands also need to be more compassionate in order to gain customer loyalty and maintain those customers in the next normal.

Care

Employee care has become a priority for organizations, and they have broadened the definition of care after the COVID-19 outbreak. They have prioritized empathy in human resources. After being sent home, employees who are able to work at home have embraced this new way of working. However, those employees who work in the field, such as delivery staff, drivers and manufacturers, need to leave their homes to perform their jobs. Many employers have already taken precautions to protect those who have to work outside the home. For instance, free face masks and hand sanitizers have been placed at the entrances of workspaces, and working hours have been rearranged to avoid crowds. It is critical that organisations ensure all employees feel valued, informed and protected during this time. This can be done by fulfilling essential needs, such as the physical need to feel secure and safe, the mental need to build psychological resilience and the relational need for connection and belonging.

Similar needs have emerged on the customer side. According to the Prosper Insights & Analytics study,

95% of consumers want companies to implement physical protection and distancing measures to help them stay healthy.¹⁹

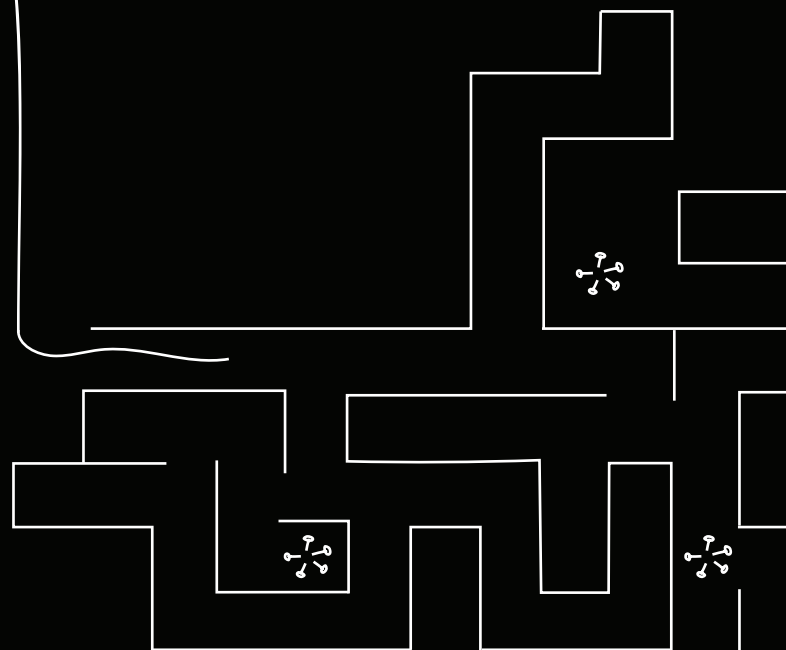
Retail giants, like Walmart, have applied new rules in their physical stores such as accepting customers one by one to avoid crowds and protect employees.²⁰ Moreover, companies like Starbucks have switched their service models and now provide only to-go orders.²¹ These new safety measures in the customer experience are likely to remain in the next normal.

Guidance

As the pandemic evolves, the uncertainty has increased the need for up-to-date information, accurate guidance and real-time support. Starting from the first days of the COVID-19 outbreak people began demanding clear instructional information on how to protect themselves. In response, Microsoft created a healthcare bot, offered on the CDC website, which enables people to ask questions about their symptoms and receive follow-up instructions.²² Other companies have launched initiatives to reassure their customers in using their services. For instance, Airbnb announced an enhanced cleaning initiative which includes the first overarching, standardized protocol for cleaning and sanitization in the home-sharing industry.²³

On the other hand, scepticism has been triggered due to information pollution. For example, there has been an endless discussion around whether face masks offer real protection or not. Due to a lack of vetted information, in the first days of the pandemic people began to imitate behaviours they saw working for others. Today, this has evolved such that large groups of people are guided by those who do not care about hygiene measures while other groups apply all measures. These diverging mindsets and behaviours have raised the question:

Who should we follow in the next normal?



Presence

Customers expect brands to quickly adopt change and ensure uninterrupted connection at all times. Before the COVID-19 outbreak, certain brands had already proven that establishing a lasting customer relationship goes beyond being present in digital channels 24/7 and using them efficiently. Although brands were already aware of how critical being present 24/7 is, the lockdown emphasized the importance of satisfying dynamic customer expectations by making products and services available at all times from every channel. According to the Strategy& report “Where retail next?” the recent lockdown has encouraged “forced experimentation”, with consumers buying different products online, consuming online services for the first time and exploring different ways to access or find substitutes for products.⁹ Certain brands quickly adapted to these trends by being present at all times and providing full product availability and service excellence.

For instance, fast-moving Turkish start-up **Getir**, which already offered 24/7 delivery pre-pandemic, has quickly expanded its product range to respond to emerging customer needs.²⁴ Another grocery delivery platform, **Instacart**, based in San Francisco, announced that it will hire 300,000 delivery staff across the US in order to meet increasing demand during the pandemic.²⁵ On the other hand, giant brands are struggling to adapt to fast-moving trends. Although **IKEA** attempted to sustain its exemplary customer experience, the company had to increase its minimum order amount for online shopping to manage delivery operations.²⁶ The pandemic has proven that **product and service availability and continuity of service excellence** will be most important in maintaining customer loyalty in the next normal.

Collaboration

All industries were affected by the winds of change caused by the pandemic. Beyond ordinary customer expectations, customers now want companies to further combat the crisis by partnering with other industries. Tech companies and governments are already working together to build surveillance apps to control the spread of COVID-19. Many companies that are normally not associated with the healthcare industry have transformed and donated their production lines to manufacture face masks and ventilators due to product shortages. Leading brands are also volunteering to solve the serious problem of product shortages.

Good examples are being set by luxury brands like **Bulgari and Louis Vuitton**, which are manufacturing hand sanitizer for healthcare workers, and tech company **HP**, which has donated 3-D printers to hospitals to produce face masks by themselves.²⁷

Proven flexibility in production and service lines and instant collaborations among brands may lead to a business future where industry barriers disappear and collective thinking appears to solve global problems.



Pleasure

Memories which are directly connected to emotions aroused by specific experiences, and experiences which are tied to pleasant emotions are usually remembered more easily than unpleasant experiences.

Because they are surrounded by unpleasant emotions during the pandemic, people will tend to remember their good experiences over time.

If brands want to sustain lasting connections with customers and remain as their customers' preferred brands, they need to trigger pleasant experiences during the crisis.

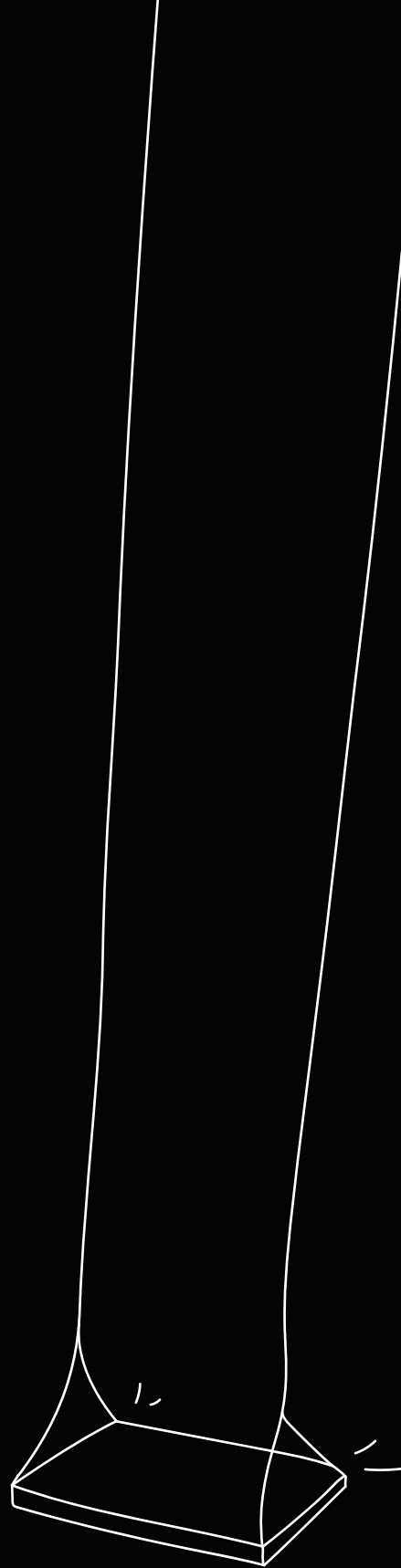
Some brands have already introduced delightful new experiences to their customers. For example, **BrewDog**, a multinational brewery and pub chain, is organizing virtual meetups where people can enjoy drinks ordered online with their friends.²⁸ **Ural Airlines**, a Russian company, began delivering in-flight meals to travel-deprived customers who miss the comfort of airplane catering due to restrictions on movement.²⁹ Setting up these kinds of new routines and being able to turn them into new rituals will be a wise move in the next normal.



Next

There is no way back to what we have left behind. Our next “normal” won’t be as normal as it was. But the fact is, we go through change constantly without realizing it, and this is our adaptability that keeps us alive. In every challenge we face, a next version of ourselves is born.

This is a new playground for future explorations and discoveries.



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Inside illustrations by Alara Bozbay

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At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 157 countries with more than 276,000 people who are committed to delivering quality in assurance, advisory and tax services. PwC has been providing services to the Turkish business world since 1981, with five offices located in four cities; Istanbul, Ankara, Bursa, and İzmir. With a professional staff of 1,750, we provide services to create the value that our clients look for.

About Experience Consulting

As PwC Experience Consulting we accelerate big ideas and make experiences real. PwC Experience Consulting creates design-led transformations and human-centric innovations with over 35 teams and 27 spaces across the globe. Based in Istanbul, the Experience Center provides you with the space, talent and solution ecosystem necessary to implement unique experiences. Here, you can create a vision for your organisation and start building the future today.



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